REQUESTING GOODS AND SERVICES THROUGH SELF-DIRECTION

STEP BY STEP INSTRUCTIONS

- 1. The participant or legal representative, operating as the "employer of record", shall check to see if the "Good or Service" meets the criteria in the service definition and the cost of the good or service is within the \$2000 limit for the service for the plan year.
- 2. When the employer of record wants to purchase an item under Goods and Services, s/he shall:
 - a. Discuss the service or goods needed with their support broker;
 - b. Decide together on a detailed plan, including the specific item(s), service, size, vendor, etc. which meets the service definition;
 - c. Gather information on the costs, bids, quotes, etc. with help from the support broker as needed; and
 - d. Contact the case manager and give all of the information needed for the "Goods and Services" form.
- 3. The case manager completes the Division's "Goods and Service" form, which is available on the Division's website, and submits it to their Participant Support Specialist at the Division. The request shall include any quotes, invoices, etc, needed by the Division to prior authorize the purchase of the Goods or Service.
- 4. After making a decision, the case manager is notified by the Division.
- 5. If approved, PPL is notified of the approval through an e-mail by Division staff.
- 6. PPL confirms with an e-mail back to Division Staff.
- 7. The case manager will allocate money for the item in the PPL Web Portal.
- 8. The employer of record, with help from the support broker if needed, completes the PPL Requisition Invoice to PPL, which is available on the PPL website or by contacting their customer service line.
- 9. When the invoice is considered complete and approved by PPL, then PPL issues a check to the vendor listed on the requisition invoice during the next pay cycle for the good or service, and the check is sent to the employer of record. *If the vendor does not accept a check, the employer and/or case manager shall contact PPL for assistance or an alternative solution.*
- 10. Case Manager shall make a copy of approved "Goods and Services" form and send it to the employer of record.
 - a. For "services", the employer of record shows the vendor the approval on the form and sets up time to start the service.
 - b. For "goods", the vendor purchases the goods and ensures they are delivered or picked up by the employer.
- 11. The employer of record will decide when to pay the vendor for the goods or service.
- 12. The employer of record shall keep the receipt for the goods or service and is are responsible for the equipment ordered. The case manager shall have a copy of the receipt in their file.

^{**}In order to take advantage of the opportunities under this service, the participant must be self-directing at least one other direct care service through PPL.